TRANSLATING USER REQUIREMENTS INTO ENROLLMENT REQUIREMENTS

Introduction:

At NASA's Jet Propulsion Laboratory (JPL) we recently went live with Oracle Advanced Benefits (OAB). When we finished setting up our plans and eligibility requirements during the project, we thought we were home free. However, we faced an even more difficult hurdle; we struggled with translating the remainder of our user requirements into Oracle's enrollment requirements. We will share our experiences with Oracle functionality, "pitfalls," and "gotchas" we experienced pre- and post- go live. Focusing on the program enrollments form, the form that brings 'life' to life events, we hope to inform the reader, 'what the form does' and 'how to translate his requirements into program enrollments'. The reader should get a sense for 'who', 'what', 'when', 'how' and 'where.' We don't intend to review all of Oracle's functionality in this document, but we will review those items that caused us problems. Before jumping into the 'what the form does', we want to set the stage for some of our lessons learned by providing some background information about the JPL environment.

Pre-requisites
(We need to identify the definitions needed, and maybe put in footnote, text or glossary.)
The ideal audience for this paper should have a basic understanding of life events, plans, programs, and eligibility in order to obtain maximum benefits. It might be useful to the reader to review the Oracle documentation that covers the set up of the form. Hopefully this document will help the reader make sense of the Oracle documentation. Because, this paper is very example and information driven, the value will come from studying the examples and tables as the text serves as a facilitator.

Background

JPL upgraded from Oracle Applications Release 10.7 to Release 11i and simultaneously implemented Oracle's Advance Benefits module at the end of 2001. Our upgrade included the Human Resources (HR) and Payroll modules. JPL has approximately 5000 employees. The benefits program at JPL seems typical; it consists of 1 program with 10 plan types and about 40 plans. There are the standard options such as 'employee and spouse', 'employee and family', as well as the Same Sex Domestic Partner (SSDP) options. There are not any flex credits or beneficiaries. There are two spending accounts. The benefits implementation scope did not include Oracle's 'action items', 'certifications' or 'communications' functionality. Figure 1 is the skeleton of the JPL Benefits Program.
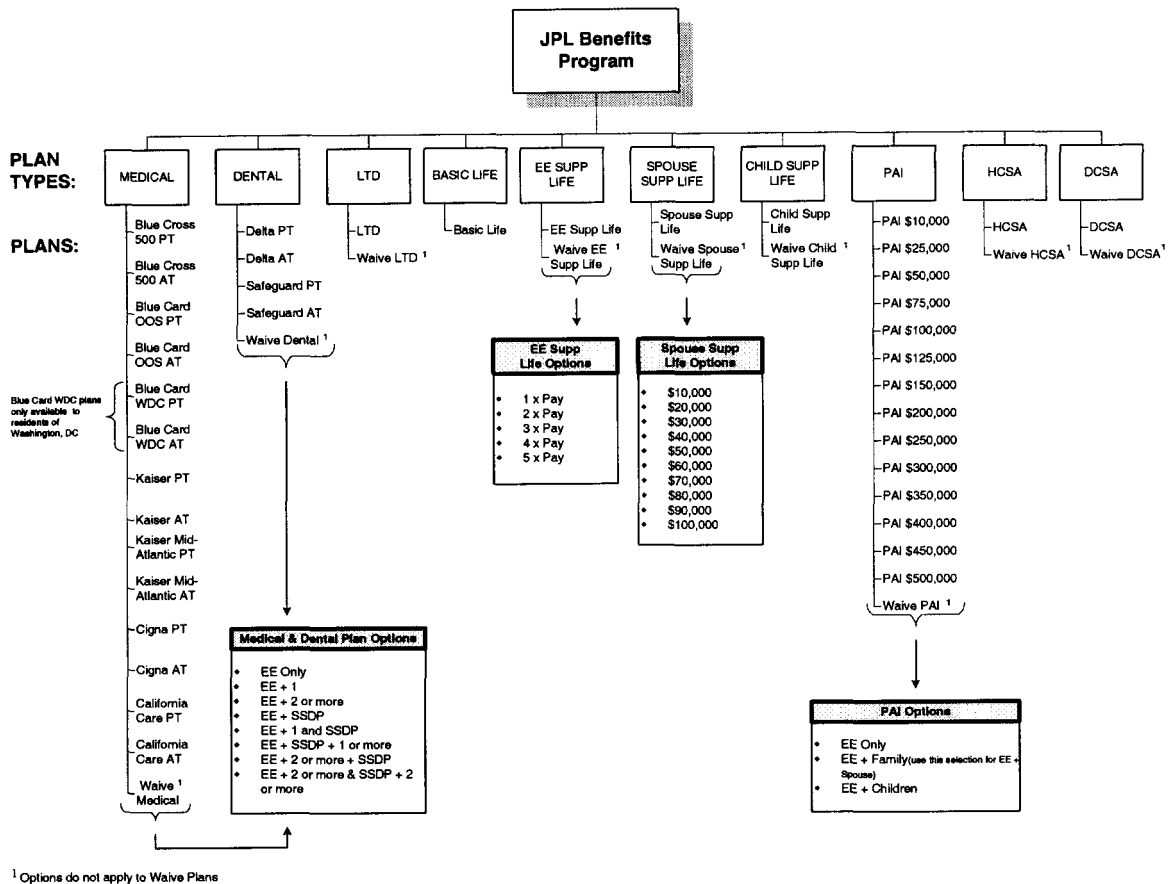
Figure 1: Outline of JPL Benefits Program

We set up a lot of individual life events because we were looking ahead to implementing self-service in the future and wanted the life events to have meaningful names for the employees—although a lot of the set up for the life event repeats itself across the life events. In some of the examples and in the latter part of this document, we will touch on a few of our life events.

What are Program Enrollment Requirements?

In order to explain what program enrollment requirements are it is useful to step through the process beginning with life events. Life events identify the opportunity for an employee to enroll in benefits elections or make a change in his current elections. We process life events to determine eligibility. Eligibility determines what changes an employee can make. Those changes are considered enrollments. The enrollment requirements determine when an eligible participant can enroll in a program, plan, or option in a plan and the effective dates. Some of the enrollment requirements are listed

Table A[1]. We like to say that the program enrollment requirements form is the form that brings 'life' to life events.

Factors/Restrictions	Meaning
Electability – ("electable choices")	➤ Can the person enroll in this option? ➤ Will they be de-enrolled?
How an enrollment is made	➤ Explicitly or automatically?
Start and end dates for enrollment	➤ Coverage start and end dates ➤ Rates start and end dates
Enrollment timing	➤ Length of the enrollment window? ➤ When can someone enroll?
Life Event related changes	➤ Can they make a change to their current enrollment after a particular life event?
Designations	➤ Are dependents or beneficiaries allowed?
Compensation object	➤ Plan, option in plan, etc...

Table A: Enrollment Requirement Capabilities

Oracle delivers two forms for setting up enrollment requirements. First, the program enrollment form is used for determining enrollment requirements at the program, plan type, and plans in programs levels. Second, the plan enrollment form is used to set up plans in programs, options in plans and plans not in a program. We will focus primarily on the program enrollment form. To navigate to the form, follow the following path: Total Compensation > Programs and Plans > Program Enrollment Requirements.

How do enrollments requirements work?

Enrollments are controlled using enrollment types. The types of enrollments that Oracle provides are summarized in Table B[2]. Even though there are several different methods for enrollment, we are going to mostly focus on explicit enrollments and life event enrollments, since that is where we experienced most of our problems. In order to describe how program enrollment requirements operate, it is useful to start with the occurrence of a life event. After the participation process has been run for a life event, Oracle applies the rules established in the enrollment requirements forms. Oracle refers to this as 'electability'. We find it easier to think of in terms of enrollment requirements—particularly since electability is set up by two forms with the words enrollment requirements in them.

---

[1] R11i, Oracle HRMS: Advanced Benefits Set-up Volume1, Student Guide, Aug 2000, Oracle Corporation, pp 1-5, 1-6

[2] Managing Total Compensation Using Oracle HRMS(US) 11i, March 2000, Oracle Corporation, pp 5-2, 5-3

Enrollment Type	Advanced or Standard Benefits	Description
Unrestricted Enrollment	Both	Required for Standard Benefits users. Not time dependent and do not require a reason for enrollment.
Open Enrollment	Advanced	Predefined time period during the plan year when a participant can alter elections in a plan.
Administrative Enrollments	Advanced	Rarely occurs. Typically used when a significant change occurs.
Life Event Enrollments	Advanced	Caused by a significant change to the participant, which enables an enrollment change.
Automatic and Default Enrollments	Advanced	Typically used to provide interim coverage before participants can make their own elections.
Explicit Enrollments	Both	Elections that are neither automatic nor default. Participant explicitly elects the benefit through self-service or benefits.

Table B: Enrollment Types

How does the form work?

As seen in Figure 2, the form has four major tabs: General, Timing, Life Events, and Dependent Coverage. Each tab provides a slightly different functionality. We will walk through this functionality in the paragraphs that follow. Beneath each major tab is a sub-tab. From this point forward, we will refer to the major tabs as 'tabs' and the lower level tabs will be called 'sub-tabs'. With the exception of the Timing tab, the combination of tab and sub-tab determine the level at which the enrollment specification apply. This combination answers the 'where' question, as in 'where does this requirement occur'; it tells us where the requirement applies. Figure 3 shows the hierarchy of the form's tabs. At this point we are ready to walk through the various portions of the Program Enrollment Requirements form.
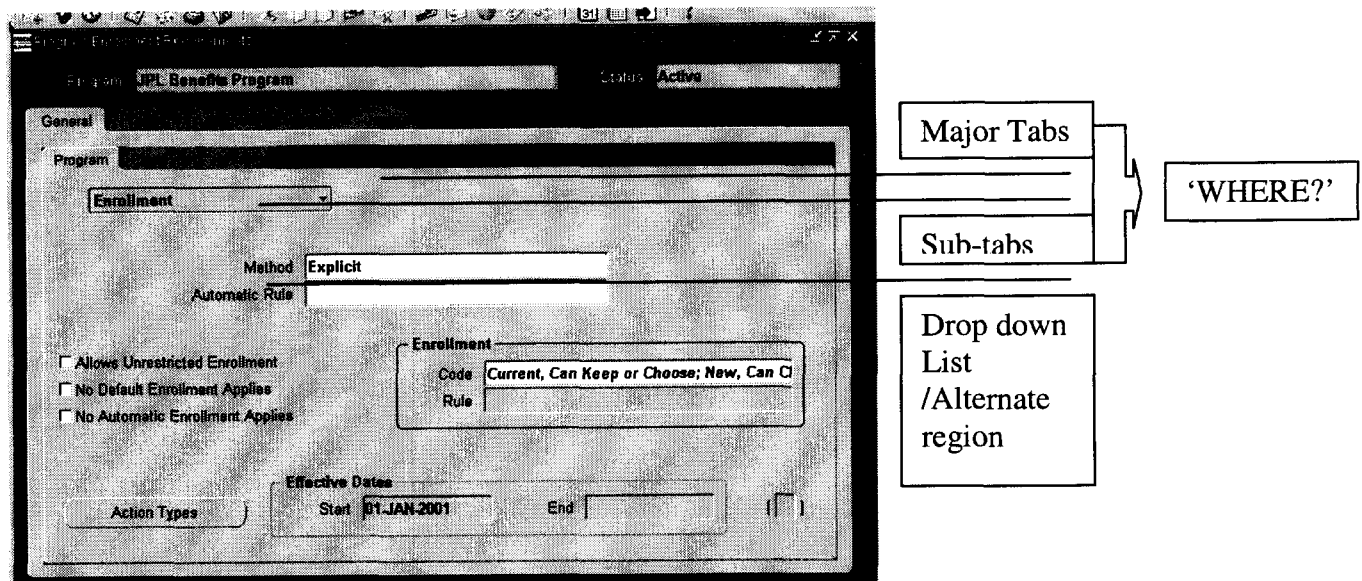
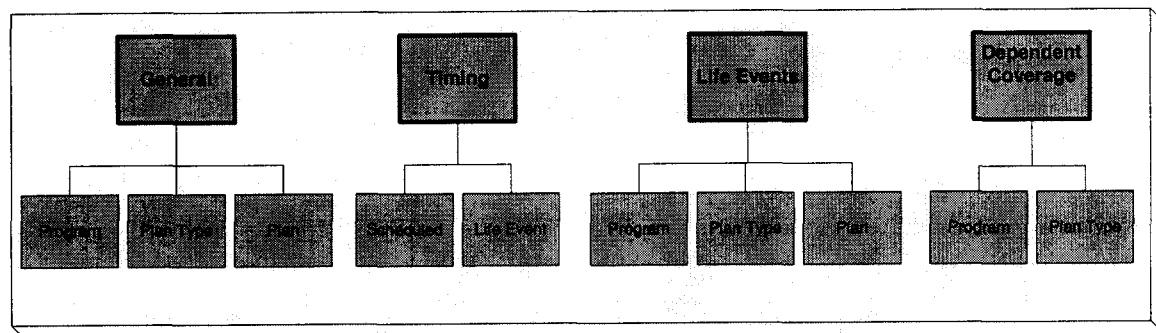**Figure 2: Tab View – General – Program - Enrollment**[3]

Figure 3: Hierarchy of Program Enrollments Form Tabs

General Tab

The General tab defines how enrollments will be determined. This tab is further broken down according to compensation object level: Program, Plan Type, and Plan. Oracle organized the key areas of functionality by using the drop down list or alternate region. The combination of General tab and Program sub-tab, Figure 2, establishes: 1) the method for the program, 2) the enrollment code, which indicates if the participant can alter elections if they are newly enrolled, or currently enrolled in a compensation object, 3) the coverage start and end dates, and 4) the rate start and end dates. In Example I, we provide some background on how we applied this information to our plan.

▪   Refer to Figure 2

---

[3] The naming of the Program Enrollment Requirements screen shot will follow the following format: Tab View – Tab – Sub-tab – Drop Down Selection

> - All our enrollment rules based on life events are done on Program Enrollment Requirements form.
> - Within this form, lower-level setups override higher-level setups (e.g. Plan setups override Program setups). Also any setup tied to a Life Event overrides setup at the Program-Plan Type or Plan level.
> - Use this form to set up the highest-level Program attributes that apply to all or most life events.
> - Enrollment code of Current, Can Keep or Choose; New Can Choose fits most situations – can override at lower levels

Example I: General – Program - Enrollment

At the Plan Type sub-tab, or the plan type level, Figure 4, we can accomplish the same actions as at the program level, but we also can 1) limit the number of plans within a particular plan type and specify any required periods of enrollment, and 2) establish default enrollment, Figure 5. Example II shows how we used the limitations drop down.

Figure 4: Tab View - General – Plan Type – Limitations

> - Refer to Figure 4
> - The Limitations drop down is unique to the Plan Type level
> - The limitation of Min 1 Max 1 is useful for preventing accidental enrollment in more than one medical or dental plan.
> - Because we also set up a Waive Plan for each Plan Type, the limitations also insure that employees are enrolled in a plan or have waived coverage for each plan type.
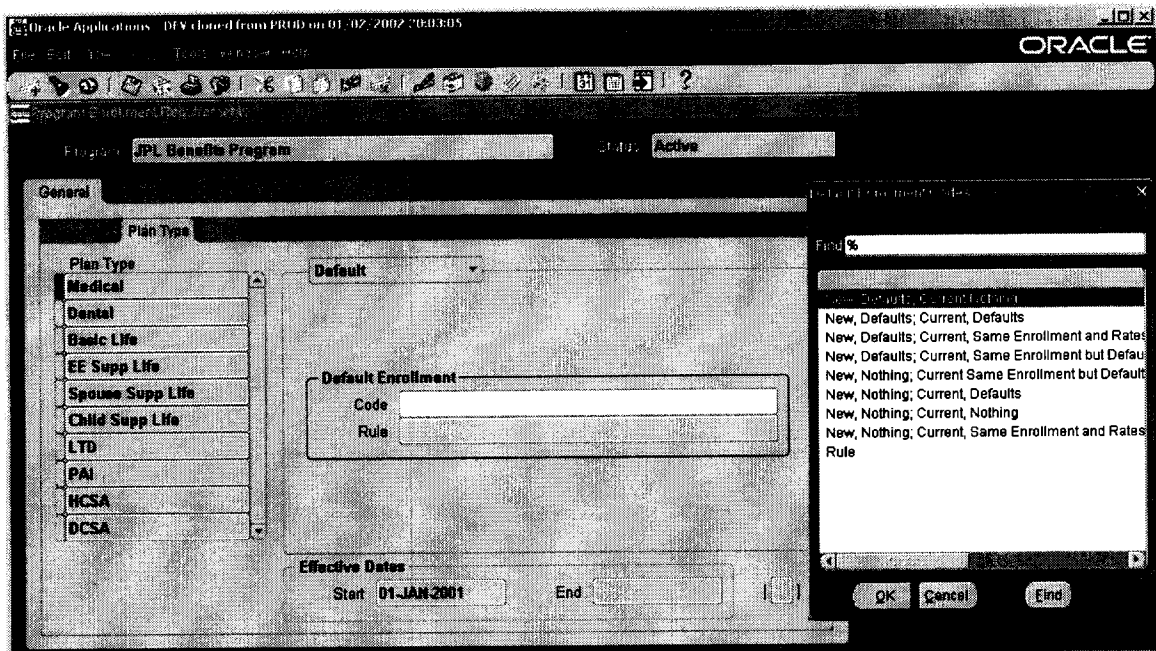
Example II

Figure 5: Tab View - General – Plan Type – Default

Moving to the Plan sub-tab, or the plan level, Figure 6, we can specify the same items as at the program level and we can specify defaults. Since reading this description of functionality can be quite confusing, Table C identifies the functionality available by tab. We've color-coded the functionality—green or the letter 'Y' indicates the functionality exists at that combination of tab and sub-tabs; red, or the letter 'N' indicates that the functionality is not available at that level.
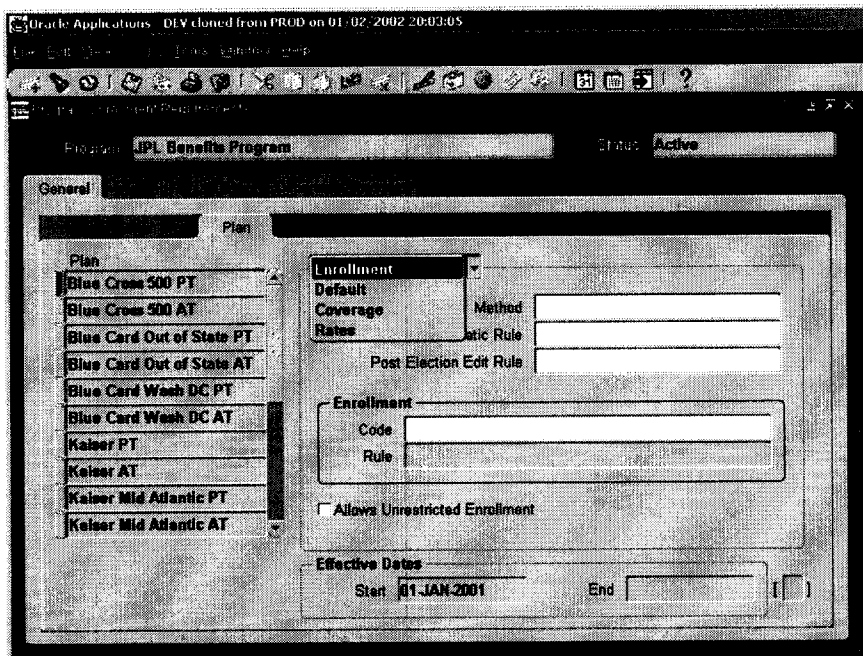
Figure 6: Tab View – General – Plan – Default

General Tab

Functionality	Program Level	Plan Type	Plan
Enrollment Method			
Enrollment Code			
Coverage Dates			
Rate Dates			
Action Type			
Limit Number of Plans			
Limit Enrollment Period			
Default Enrollment			
Enrollment Type			
Enrollment Periods/Defaults/Dates			
Comp Object Level Enrollment Change Permitted			
Eligibility Profiles			
Designation Level			

Table C: General Tab Functionality Matrix

Timing Tab

The Timing tab has two sub-tabs that define scheduled enrollments and life event related enrollments, Figure 7. The Scheduled sub-tab is primarily used for either administrative or open enrollment. An administrative enrollment usually is used when there are special circumstances and benefits need to be modified. The other enrollment requirements that can be specified within the Scheduled sub-tab are 1) the enrollment period start and end dates, last processing date, and the defaults assign on dates, 2) rate start and end dates 3) coverage start and end dates.

Figure 7: Tab View – Timing - Scheduled - General

The combination of the Timing tab and the Life Event sub-tab is where we bring specify what the life events can really accomplish, Figure 8. Most of our enrollment requirements, or electability rules, that events are encountered on a daily basis revolve around the occurrence of a life event. In this section, we have numerous examples with comments and tips. Example III describes how we setup the Timing – Life Event – General section.

Figure 8: Tab View - Timing – Life Event – General

- Refer to Figure 8
- Use the General region to defined when to close Elections for each Life Event. Note that seeded Temporal events (see Age Changed) are also defined here.
- Under the Close Enrollment Date to Use the Options are:
  o Processing End Date
  o When Elections Are Made – We used this option for life events that a have a specified enrollment period – such as the JPL New Hire event which allows employees to enroll in plans up to 31 days after hire.
  o When Enrollment Period Ends – We used option when a life event did not have an enrollment period as in the case of a Base Pay Change.
- The Option selected is affected by the Enrollment Periods defined next

Example III: Timing – Life Event - General

The Rates option of the drop down list, the Rate Start and End date section, Figure 9, of this form establishes when the deductions get assigned to the participant's element entries. Example IV discusses the set up of this form.

Figure 9: Tab View – Timing – Life Event – Rates with Child Form

> - Refer to upper portion of Figure 9
> - The Rate codes are very critical (especially if you have Oracle payroll) because these definitions determine the start and end dates of element entries based on the life event.
> - TIP: It is a good idea to keep rate start and end date codes consistent with the start and end date codes for coverages
> - Note the Enrollment Period for Plan Button (lower portion of Figure 9). The form accessed allows overrides to Rate and Coverage start and end dates for specific plans. TIP: if you use this section you will need to enter all codes--not just the ones that are different.

Example IV: Timing - Life Event – Rates with Child Form

Likewise the coverage option on the drop down list, Figure 10, specifies the coverage start and end dates. Example V provides some tips for this particular form.

Figure 10: Tab View – Timing –Life Event – Coverage

> - Refer to Figure 10

> - Use the Coverage region to define when coverage begins based on the life event Occurred Date
> - The Coverage codes are key to the setup of the program.
> - TIP: The date that these codes refer to is the occurred date of the event.
> - The mysterious 1 Prior or … codes are somewhat confusing – basically if the life event is causing a change in coverage the old plan is end dated 1 day prior to the start of the new coverage. If there is no new coverage (like the plan is dropped) the coverage ends on the end of the month in this example
> - TIP: Keep these codes simple if possible (e.g. start code of event – end code of 1 day before event)

Example V: Timing – Life Event – Coverage

The period option on the drop down list, Figure 11, specifies how long the enrollment period is relative to that event. The enrollment period start and end date codes work with the Close Enrollment Date Codes and should be considered together. Example VI covers how we combined the two codes. The Timing Tab functionality matrix is in Table D.

Figure 11: Tab View – Timing – Life Event - Periods

> - These Codes work with the Close Enrollment Date Codes
> - How we combined the Close Enrollment and Period Start/End Date codes:

Close Enrollment Date Code	Type of Life Event	Enrollment Period Start	Enrollment Period End
When Elections Are Made	Events that typically have a plan defined enrollment period (e.g. Open, New Hire	As of Event	31 Days After Event
When Enrollment	Events that Typically do not	As Of Event	As Of Event

Period Ends	have enrollment periods (e.g. Age Changed, Base Pay Change)

Example VI: Timing – Life Event - Periods

Timing Tab		
Functionality	Scheduled	Life Event
Enrollment Method		
Enrollment Code		
Coverage Dates		
Rate Dates		
Action Type		
Limit Number of Plans		
Limit Enrollment Period		
Default Enrollment		
Enrollment Type		
Enrollment Periods/Defaults/Dates		
Comp Object Level Enrollment Change permitted		
Eligibility Profiles		
Designation Level		

Table D: Timing Tab Functionality

Life Event Tab

The Life Event tab is meant to restrict a participant's enrollments based on their current enrollment status (this is for a participant already enrolled). This is confusing because there is also a sub-tab called Life Event as well. The two pieces of functionality provided at the Life Event tab and at each the Program, Plan Type and Plan sub-tabs, Figure 12 through Figure 16, are: 1) permit enrollment change, and 2) enrollment method and codes. Example VIII trough Example X demonstrate various pieces of our setup at the Program, Plan Type and Plan level. Table E contains the life event functionality matrix.

Figure 12: Tab View - Life Event – Program – General

Figure 13: Tab View - Life Event – Program – Enrollment

- Refer to Figure 13
- The Life Event Tab is where we define what kind of changes to benefit plans can be made for each life event you use.
- Use a Default Enrollment code to re-enroll employees in plans that they could change or drop as a result of a life event if no change is made. – The code shown here "New Nothing: Current, Same Enrollment and Rates is probably the most common.

■	This setup can also be done at the Plan Type or Plan level if appropriate

Example VII: Life Event – Program – Enrollment

Figure 14: Tab View - Life Event – Plan Type – General

- ■ Refer to Figure 10
- ■ This form limits the plan types employees can enroll in or change based on a specific life event. These are especially important employees are allowed to do their own enrollments
- ■ TIP: If your benefits department will be doing enrollments for employees, these restrictions can be a problem. To avoid problems, you may want to set up a generic life event that allows enrollments or changes to any plan for use by your benefits department.
- ■ TIP: You probably do not want to limit changes that can be made for the conversion life event you define to convert your data. After conversion, you will probably need to be able to reopen the event to make changes in employee coverages.

Example VIII: Life Event – Plan Type – General

Figure 15: Tab View – Life Event – Plan - Enrollment

- ▪ Refer to Figure 15
- ▪ This is the setup we used to automatically enroll a newly hired employee into our Basic Life Insurance plan. The method of Automatic overrides the program level Explicit method for this plan. Using this setup, as soon as the life event is triggered the employee is enrolled in Basic Life and the element entry is created in payroll.
- ▪ TIP: for new hires we originally defined the life event to trigger on changed data on the person form. We discovered that when the new hire life event processed that night, rates calculations were not correct because the employee did not yet have a completed assignment record and a current salary. To fix this, we re-defined our new hire life event to not trigger until the employees salary was entered on the salary for

Example IX: Life Event – Plan – Enrollment

Figure 16: Tab View – Life Event – Plan – Enrollment (Default)

> - Refer to Figure 16
> - This is the setup we used to put new hires into waive plans, which we did for all plans except Basic Life Insurance. With this setup, the enrollment form displays Basic Life and waive plans for all other plans. This saves time in enrolling new employees and helps make sure employees are enrolled in all plans.

Example X: Life Event – Plan – Enrollment (Default)

Life Event Tab			
Functionality	**Program Level**	**Plan Type**	**Plan**
Enrollment Method			
Enrollment Code			
Coverage Dates			
Rate Dates			
Action Type			
Limit Number of Plans			
Limit Enrollment Period			
Default Enrollment			
Enrollment Type			
Enrollment Periods/Defaults/Dates			
Comp Object Level Enrollment Change permitted			
Eligibility Profiles			
Designation Level			

Table E: Life Events Tab Functionality

Dependent Coverage Tab

The Dependent Coverage tab specifies how a participant may cover dependents and beneficiaries[4]. The Program and the Plan Type sub-tabs offer the same functionality. The designation level determines where the system will look for the dependent coverage, Figure 17 and Figure 18, eligibility profiles and coverage dates. Example XI shows how we set up dependent coverage. The major functionality, Table F, offered on these forms is coverage start and end date, profiles, certifications, and dependent designation (optional or mandatory).

Figure 17: Tab View - Dependent Coverage - Program

---

[4] R11i, Oracle HRMS: Advanced Benefits Set-up Volume1, Student Guide, Aug 2000, Oracle Corporation, pp 1-5, 1-6

Figure 18: Dependent Coverage – Plan Type

- Refer to Figure 18
- This form is where coverage start dates are defined for dependents.
- During our implementation, we had some problems getting dependent coverage to start at the same time as the employee's coverage.
- The codes shown: "Participant's Enrollment Start Date" and Participant's Enrollment Coverage End Date were added by Oracle last fall and we found that they worked well for us.

Example XI: Dependent Coverage – Plan Type

Dependents Tab		
Functionality	Program	Plan Type
Enrollment Method		
Enrollment Code		
Coverage Dates		
Rate Dates		
Action Type		
Limit Number of Plans		
Limit Enrollment Period		
Default Enrollment		
Enrollment Type		
Enrollment Periods/Defaults/Dates		
Comp Object Level Enrollment Change permitted		
Eligibility Profiles		
Designation Level		

Table F: Dependents Tab Functionality

The button off the lower portion of the form Figure 19, called Dependent Change of Life Event opens another form. This form, Figure 20, determines how a participant may change dependents for a life event, and when the life events coverage starts and stops.

Figure 19: Tab View – Dependent Coverage – Plan Type

Figure 20: Dependent Change of Life Event Form

> - Refer to Figure 20
> - This form is where you define what change in dependent coverage is allowed for each life event.
> - Remember to define the Change Dependent Coverage for all life events that allow dependent changes, including the your upgrade data conversion event if appropriate.

Example XII: Dependent Change of Life Event Form

Conclude and Transition to next section

Putting It All Together

At the point that we are ready to set up the Program Enrollment Requirements form we should have the following information:
- A working knowledge of the Program Enrollment Requirements form
- A comprehensive list of our user requirements including:
    o The benefits to be included in this program
    o Requirements to be eligible for each benefit
    o Enrollment periods
    o Start date of coverages
    o Start date of rates
    o End date of coverages
    o End date of rates
    o Any additional "special" user requirements that need to be taken into consideration
- Created Life Events, Plans, Options, etc.

With this information in hand we are now ready to unite our user requirements with our life events.

Every organization has its own unique requirements, and depending on the specifics of those requirements, there may be more than one way to do the setup. To give our reader the concept, we will present in this section a sample of some of JPL's requirements and how we translated them into the Program Enrollment Requirements form. Our examples will be based on the following two life events:

- JPL New Hire
- JPL Became Ineligible for Benefits

The format for this portion of the presentation will be based on the following two tables:

- **Table A: User Requirements** provides our user requirements for when an employee is hired and for when an employee becomes ineligible for benefits. A brief explanation of the setup performed to meet those requirements and the accompanying rationale is included. Large bold numbers at the right of the table cross reference with the same number in Table B.

- **Table B: Program Enrollment Requirements** is a sample of our setup documentation for the example life events. These were based on working documents that we used for the initial and subsequent analyses of our life event setups and as our blue print when performing the actual setup steps. The large bold numbers in this document are in sequential order and cross reference with the same number in Table A.

Table A: User Requirements

Life Event	User Requirements	Rationale and Navigation for Setup on the form (Navigation: Primary Tab > Sub Tab > Drop Down Region)	Reference No.
JPL New Hire	All benefits, except Basic Life, are optional and need to be elected by the employee. If a plan is not selected, coverage needs to default as waived. Since Basic life coverage is not optional, it should be automatic given to eligible employees and should not have to be selected.	JPL identified nine benefit plans to be used in OAB. To default and track when they were waived, each of the nine plans needed to have a corresponding "waived" plan. In Life Event > Program Tab > Enrollment drop down region the JPL New Hire life event was given the Default Enrollment Code of *New, Nothing; Current Same Enrollment and Rates.* In the Life Event > Plan Tab > Enrollment drop down region, the Waived Plans were set up to be assigned on default if another coverage was not selected. The Default Enrollment Code was also identified as *New, Defaults; Current, Defaults.* Also in the Life Event > Plan Tab > Enrollment drop down region, the Basic Life plan is set up for *Automatic* enrollment for the JPL New Hire life event.	9 10 11
	Employees are limited to one selection at a time within each benefit plan. Example: An employee may be covered by Blue Cross or Kaiser but not by both at the same time.	The General > Plan Type Tab > Limitations drop down region is specifically designed to address this limitation. Each Plan Type was assigned a minimum and a maximum of One (1) plan.	1
	Employees have a 31-day enrollment period. After that, enrollment is closed.	In the Timing > Life Event > Periods drop down region, the enrollment period was identified as starting *As of the Event.* In this case the event is the employee's hire date. Enrollment ends *Thirty-one Days After Event.* In the Timing > Life Event > General drop down region no additional days were set up for additional processing after the 31 days. The form was also set up to close the enrollment *When Elections Are Made.* Therefore, once elections have been made and the record is saved, the user is given the option of closing the enrollment. If not closed at that point, it will be automatically closed at the completion of the 31 days.	4 2
	Coverage and rates begin on the first of the month following hire except when the employee is hired on the first working day of the month. When hired on the first working day, coverage is immediate.	Since first working day of the month could also include holidays that occur at the first of the month but that may vary from year to year, a custom rule had to be developed. Coverage and Rates each had their own rule. Set up for this was done in the Timing > Life Event >Coverage and Timing > Life Event > Rates drop down regions.	3

Life Event	User Requirements	Rationale and Navigation for Setup on the form (Navigation: Primary Tab > Sub Tab > Drop Down Region)	Reference No.
	Dependent eligibility for medical and dental coverage is based on the employee being covered.	Setup for designation of dependent information was done on the Dependent Coverage > Plan Type tab for the Medical and Dental plan types only. We made dependent designation optional. To link this requirement to the JPL New Hire life event, we had to additionally set up information on the Dependent Change of Life Event form. Since this is the first life event for an employee, the only dependent activity needed is to add dependents. Th code selected was *May Add Dependents*. The coverage start and end dates were set up to be the same as those for the employee.	12 13
JPL Became Ineligible or Benefits	When an employee no longer meets JPL's eligibility requirements, coverage must be discontinued. De-enrollment in benefits should be automatic.	When an employee becomes ineligible for coverage, there is nothing to elect. Therefore, there is no need for an enrollment period. Setup for this requirement was done on the Timing > Life Event > Periods drop down region. Both the enrollment period start and end dates were set up using the *As of Event Date* code. Since there is no enrollment period, the Timing > Life Event > General drop down region was assigned a Close Enrollment Date to Use code of *When Enrollment Period Ends*. The de-enrollment will be automatic as soon as the event date occurs.	7 5
	Coverage and rates for all benefits, except LTD, cease at the end of the month in which an employee becomes ineligible. For LTD coverage ends on the employee's last day of eligibility and the rate ends at the end of the pay period.	The Timing > Life Event > Coverage and Rates drop down regions were given an Enrollment Coverage End Date and a Rate End Date of *End of Month* since that is when coverage and rates stop for all benefits except LTD. The start date for enrollment coverage and rates in this case is the date on which the employee became ineligible, or the *Event*. Since all set up, except the end date for coverage and rate, is the same for LTD as all the other benefits, a separate life event was not required. The setup to identify the unique date requirements for LTD coverage and rate was input on the Enrollment Period for Plan form. The navigation to this form is through a button on the Timing > Life Event tab. Since the coverage ends on the date the employee becomes ineligible, the Enrollment Coverage Start and End Date is *Event*. The Rate Start Date is also *Event*. However, the Rate End Date is *End of Pay Period*.	6 8

Table B: Program Enrollment Requirements
General: Plan Type

Plan Type	General (Tab) > Plan Type (Tab)		
	Choose **General** from drop down **Check Boxes** (Blank except as noted)	Choose **Limitations** from drop down (Blank Except as noted)	Leave all fields blank on the following drop down regions: **Enrollment, Default, Coverage Rates**
All Plan Types	Blank	Number of Plans: Min = 1 Max = 1	Blank

Table B: Program Enrollment Requirements (Cont.)
Timing: Life Event

Table B: Program Enrollment Requirements (Cont.)
Timing: Life Event (Cont.)

			Timing (Tab) > Life Event (Tab)			
Life Event	**Choose General from drop down**	**Choose Coverage from drop down**	**Choose Rates from drop down**	**Choose Periods from drop down**	**Enrollment Period for Plan (Button)**	**Enrollment Rules (Button)**
JPL New Hire	Days after Enrollment Period to Apply Default: **Blank** 2 Close Enrollment Date to Use: **When Elections Are Made**	Enrollment Coverage Start Date Code: **Rule** 3 Rule: **COV_START_DATE** Enrollment Coverage End Date Code: **1 Prior** Enrollment Coverage End Date Rule: Blank	Rate Start Date Code: **Rule** 3 Rule: **RATE_START_DATE** Rate End Date Code: **1 Prior** Rate End Date Rule: Blank	Enrollment Period Start Date Code: **As of Event** 4 Enrollment Period End Date Code: **Thirty-one Days After Event**	N/A	Blank
JPL Became Ineligible for Benefits	Days after Enrollment Period to Apply Default: **Blank** 5 Close Enrollment Date to Use: **When Enrollment Period Ends**	Enrollment Coverage Start Date Code: **Event** 6 Rule: Blank Enrollment Coverage End Date Code: **End of Month** Rule: Blank	Rate Start Date Code: **Event** 6 Rule: Blank Rate End Date Code: **End of Month** Rule: Blank	Enrollment Period Start Date Code: **As of Event Date** 7 Enrollment Period End Date Code: **As of Event Date**	See below "Timing Enrollment Period for Plan" table 8	Blank

Table B: Program Enrollment Requirements (Cont.)
Timing: Life Event (Cont.)

"Timing Enrollment Period for Plan" table					
Life Event	Plan	Enrollment Coverage Start Date	Enrollment Coverage End Date	Rate Start Date	Rate End Date
JPL Became Ineligible for Benefits	LTD	Event	1 Day Before Event	Event	End of Pay Period

Table B: Program Enrollment Requirements (Cont.)
Life Event: Program

		Life Event (Tab) > Program (Tab)			
Life Event	**General** (drop down region)	**Enrollment** (drop down region)			
JPL New Hire	Current Enrollment Precludes Change: Blank Still Eligible, Can't Change: Blank	Method: Blank Automatic Rule: Blank	Enrollment Code: Blank Rule: Blank	Default Enrollment Code: **New, Nothing; Current Same Enrollment and Rates** Rule: Blank	

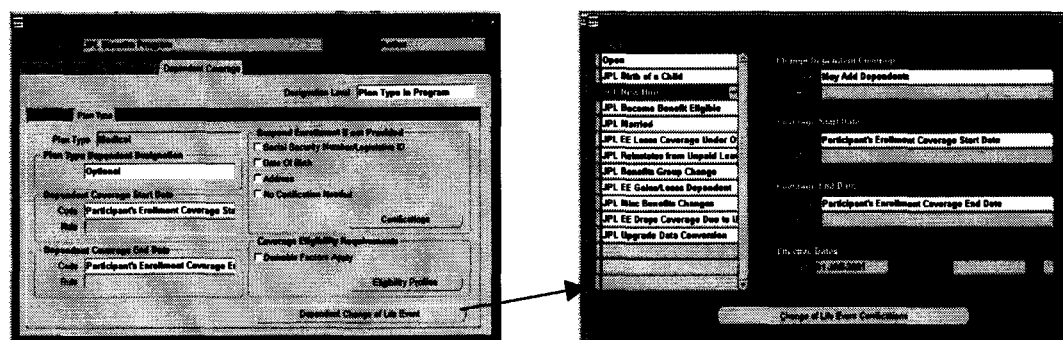# Table B: Program Enrollment Requirements (Cont.)
Life Event: Plan

		Life Event (Tab) – Plan (Tab)					
		Complete for each plan identified in Column 2 (Plan)					
Life Event	Plan	General (drop down region)		Enrollment (drop down region)			
JPL New Hire	Waive Medical Waive Dental Waive EE Supp Life Waive Spouse Supp Life Waive Child Supp Life Waive PAI Waive HCSA Waive DCSA Waive LTD	Current Enrollment Precludes Change: Blank Still Eligible, Can't Change: Blank	Enrollment Change: Blank	Method: Blank Automatic Rule: Blank	Enrollment Code: Blank Rule: Blank	Default Enrollment Code: **New, Defaults; Current, Defaults** 🔟 Rule: Blank	Assign on Default: **X** 🔟

Table B: Program Enrollment Requirements (Cont.)
Life Event: Plan

		Life Event: Plan (16)					
		Complete for each plan identified in Column 2 (Plan)					
Life Event	Plan	General (drop down region)		Enrollment (drop down region)			
JPL New Hire	Basic Life	Current Enrollment Precludes Change: Blank Still Eligible, Can't Change: Blank	Enrollment Change: Blank	Method: **Automatic** Automatic Rule: Blank	Enrollment Code: Blank Rule: Blank	Default Enrollment Code: Blank Rule: Blank	Assign on Default: Blank

Table B: Program Enrollment Requirements (Cont.)
Dependent Coverage: Plan Type

		Dependent Coverage: Plan Type	
		Dependent Change of Life Event (Button)	
Plan Type	Changes associated with Plan Type:	Life Event	Changes associated with life event:
Medical Dental	Plan Type Dependent Designation: **Optional** 12 Dependent Coverage Start Date: **Participant's Enrollment Coverage Start Date** Dependent Coverage End Date: **Participant's Enrollment Coverage End Date**	JPL New Hire 13	Change Dependent Coverage: **May Add Dependents** Coverage Start Date **Participant's Enrollment Coverage Start Date** Cover age End Date: **Participant's Enrollment Coverage End Date**